11. Food Instrument Production and Processing

The functionality of the WIC System allows the user to create food instruments for the participant, void food instruments, mark food instruments as stolen, and optionally replace the food instruments.

11.1 Issue Benefits (Benefits Tab)

The Benefits tab of the Issue Benefits dialog allows the user to select the sets of benefits to be produced for the participants of the household. It is invoked in response to the following user actions:

- Selection of the Issue Benefits menu item from the Benefit Management menu defined in Clinic Chapter 09 – Participant Folder.

- Selection of the Issue Benefits toolbar button from the Participant Folder toolbar defined in Clinic Chapter 09 – Participant Folder.

- Selection of the Issue Benefits menu item from the Guided Script menu defined in Clinic Chapter 10 – Certification Guided Script.

- Selection of the Issue Benefits button on the Certification Guided Script dialog defined in Clinic Chapter 10 – Certification Guided Script.

- Selection of the Benefits tab on the Issue Benefits dialog defined in this document.

Figure 1– Issue Benefits Dialog (Benefits Tab)

11.1.1 Controls

This section describes the behavior of the controls on the Benefits tab of the Issue Benefits dialog.

11.1.1.1 Household Member Information Data Grid

The control displays information about household members. It is enabled when the Benefits tab is active. It includes the following columns:

- Household Participant
- Issuance Frequency
- Last Set Issued Date (Last Set Issued)
- Prior Certification Date (Prior Cert Date)
- Certification Due Date (Cert Due Date)
- Categorical Ineligibility Date
- WIC Category
- Termination Reason

A row is added for each member of the household. The values are read-only. Clicking a row selects it.

Rows are initially sorted in ascending order by the value in the Household Participant column.

11.1.1.2 Benefits to be Issued Tree View

The control displays food instrument benefits prescribed to members of the household but not yet issued to them and organizes those benefits by the household members to whom they are prescribed. It is enabled when the Benefits tab is active. The data is organized in the following hierarchical structure:

```
Benefits to be Issued Root

|

|_Household Member Node

  |

  |_Set of Benefits Node
  |_Set of Benefits Node
```

A Household Member node is added under the root node for each member of the household to whom food instrument benefits have been prescribed but not issued.

A Set of Benefits node is added under each Household Member node for each set of benefits to be issued to the household member.

The Household Member node for the participant identified as the base participant is selected.

The defaults for the tree view will take into account the following factors:

- Cycle Adjustment – The system suggests sets of benefits such that the participants of the household will pick up benefits at the same time.

- Issuance Frequency – The system suggests the number of sets of benefits for a household participant according to the issuance frequency specified by the CPA in the CPA-Determined Follow-up dialog defined in Common Interface Panels Chapter O – CPA Determined Follow-up. The system automatically limits the participant to one (1) set of benefits if their Proof of Residency, Proof of ID or Proof of Income is still pending and they are not homeless. When a participant produces a VOC document as proof of WIC eligibility, these edits do not apply as a requirement for certification: Proof of Residency, Proof of ID, or Proof of Income.

- Late Pickup – The system adjusts the package size for the first set of benefits for the affected household participants if the household participant is late in picking up benefits.

- Certification End Date – The system does not suggest benefits past the end of the month of the current certification period for the household participant.

- Previous Issuance – The system does not suggest sets of benefits to print for a participation month in which the household participant has already received a set of benefits.

The global steps necessary to suggest the correct sets of benefits to issue for the household are as follows:

- Identify the base participant (the household participant to whose issuance cycle all other household members' issuance cycles are adjusted)

- Determine sets of benefits to issue for base participant

- Cycle adjust other household participants according to the sets of benefits to be issued for the base participant

- Prorate package sizes based on cycle adjusted sets (which the user can override)

11.1.1.2.1 Populate Tree View

Each step is defined in detail below.

11.1.1.2.1.1 Identify the Base Participant

The system attempts to determine the participant who has the longest continuous participation on the WIC program by checking the certification records for the participant. There may not be any gaps between the end date of one certification and the beginning date of the next certification period to count as a continuous certification. The participant with the longest continuous certification is considered the base participant, unless that participant will be categorically ineligible at the time of issuance of the first set of benefits. In this case, the system checks for the next longest certification. The algorithm is repeated until the base participant is found.

If all household participants have equal lengths of continuous certifications, or the system does not have adequate information due to in-state or out-of-state transfers, the system determines the base participant according to the following rules:

- The system starts with the oldest infant or child in the household whose certification end date is greater than the current system date.

- If the participant will be categorically ineligible before the end of the current certification, the system skips to the next oldest household participant.

- If the participant has not yet received benefits for the current participation month, the system determines the first date to use for the first set of benefits for the participant. If this date is past the certification end date for the current certification of the participant, the system skips to the next oldest household participant.

- The resulting participant is the base participant.

11.1.1.2.1.2 Determine Set of Benefits to Issue for Base Participant

The following steps are performed to determine the sets of benefits that should be issued to the base participant:

- If the certification period of the base participant ends before any benefits would be generated according to following steps, no sets of benefits will be suggested for any household participant.

- If no previous benefits are present for the current certification period for the base participant, both the expected and actual first date to use for the first set of benefits will be the current system date. The last date to use for the first set of benefits will be the number of days in the current month after the first date to use.

- If two sets of benefits are issued and outstanding for the participant (two sets with a first date to use greater than the current system date), no sets of benefits will be suggested.

- If previous benefits are present for the current certification period, the expected first date to use is one day after the last date to use for the last set of benefits issued for the current certification period. This is the date shown on the hard copy benefit as the first date to use even if the participant is late picking up benefits. The purpose of printing this date along with the calculated last date to use is to show the complete benefit period as requested by FNS. The actual first date to use is the later of the expected first date to use or the current system date so that it reflects the actual pick up date. The actual first date to use is carried in the food instrument set table, but is not shown on the hard copy of the benefit. The last date to use for the first set of benefits will be the number of days in the current month after the expected first date to use.

- If the last date to use is before the current system date, the expected first date to use becomes one day after the last date to use. The new last date to use will be the number of days in the current month after the expected first date to use. The algorithm will be repeated until the last date to use is greater than the current system date.

- Once the first set of benefits has been determined, the system suggests up to two additional sets of benefits with adjoining first date to use and last date to use until one of the following conditions exist:

    o The first date to use is greater than the termination date for the current certification.

    o The first date to use is greater than the certification end date for the current certification.

    o The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)

    o The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).

    o The number of sets to be issued is one (1), the participant is not homeless, and their Proof of Residency, Proof of ID or Proof of Income is still pending. Or, the participant does not produce a VOC document as a proof of WIC eligibility.

11.1.1.2.1.3 Cycle Adjustment of Household Participants

Once the first set of benefits has been determined for the base participant, the system determines the sets of benefits to be issued for each additional household participant as follows:

- The system determines the first set of benefits to be issued for the household participant according to the rules specified above for the base participant.

- The system searches for the most recent historical or suggested issuance for the base participant where the actual first date to use is less than or equal to the actual first date to use for the current participant. The system sets the last date to use for the current participant to the same date as the last date to use for the base participant.

- Once the first set of benefits has been determined, the system suggests up to two additional sets of benefits with adjoining first date to use and last date to use until one of the following conditions exist:

    o The first date to use is greater than the termination date for the current certification.

    o The first date to use is greater than the certification end date for the current certification.

    o The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)

    o The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).

    o The first date to use for the set is greater than the first date to use for the last set suggested for the base participant.

    o The number of sets to be issued is one (1), the participant is not homeless, and their Proof of Residency, Proof of ID or Proof of Income is still pending. Or, the participant does not produce a VOC document as a proof of WIC eligibility.

11.1.1.2.1.4 Create Partial Month Issuance Based on Cycle-Adjusted Sets

Once sets of benefits have been suggested for each household participant, the system determines the prorating of package sizes for the first set of benefits for each household participant according to the following:

The system calculates the number of days between the actual first date to use and the last date to use for the set of benefits.

For women and children, the following chart shows the partial month issuance for milk and juice:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1– 7	¼ package
8 – 15	½ package
16 – 23	¾ package
24 – 31	Full package

For infants, the following chart shows the partial month issuance for formula:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1 – 7	½ package
8– 15	¾ package
16 – 31	Full package

The user can override the proration of the first set of benefits using the Edit First Set of Benefits dialog defined in this document. The dialog is invoked when the user selects the Edit First Set button on this dialog.

11.1.1.2.2 Household Participant Tree View Node

The node of the Benefits to be Issued tree view displays the household participant receiving benefits. The node will consist of an appropriate icon and text in the format of {First Name Middle Initial Last Name}. The Household Participant tree view nodes will be sorted in alphabetical order by last name then by first name. All of the Household Participant tree view nodes will be expanded. If the household participant is considered to be the base participant for cycle adjustment, the icon for their Household Participant tree view node will be different.

11.1.1.2.3 Set of Benefits Tree View Node

The node of the Benefits to be Issued tree view displays the set of benefits to be issued to the household participant. The node will consist of an appropriate icon and text in the format of {(first date to use) (last date to use) (package size indicator [FULL, ¾, ½, ¼])}. The Set of Benefits tree view nodes are sorted in chronological order by the first date to use.

11.1.1.3 Cycle Adjust to this Household Member Check Box

The control allows the user to change the base participant for cycle adjustment to another household member. It is enabled when a Household Participant tree view node is selected for a household member that is not the base participant.

11.1.1.4 Preview Benefits Button

The control allows the user to preview the set of benefits to be issued to the household participant. It is enabled when a Set of Benefits tree view node for a Household Participant tree view node is selected. Its mnemonic is "P".

Note: For EBT Clinics, the Preview Benefits control will not display.

11.1.1.5 Edit First Set Button

The control allows the user to alter the first date to use and the package size of the first set of benefits to be issued to the household participant. The Edit First Set button is enabled when the first Set of Benefits tree view node for a Household Participant tree view node is selected. It has a mnemonic of "E".

11.1.1.6 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. It is enabled when the Issue Benefits dialog is active.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

11.1.1.7 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. It is enabled when the Mailing Benefits check box is selected.

Note: For EBT Clinics, the Generate Address Label check box will not display.

11.1.1.8 Print for Household Button

The control edits the values of the controls, prints the indicated sets of benefits for the household, and exits the Issue Benefits dialog. The Print for Household button is enabled when a WIC benefit queue is selected for the workstation and benefits exist in the Set of Benefits tree view. If no benefits exist to print or if no benefit printer is defined, the button will be disabled. It has a mnemonic of "H" and is the default button for the dialog.

Note: For EBT Clinics, this button will be titled "Issue to Household".

11.1.1.9 Print for Member Only Button

The control edits the values of the controls, prints the indicated sets of benefits for the selected household participant, and exits the Issue Benefits dialog. The Print for Member Only button is enabled when a WIC benefit printer is specified in System Tools and a Participant is selected in the Set of Benefits tree view. If no benefits exist to print, the button will be disabled. It has a mnemonic of "M".

Note: For EBT Clinics, this button will be titled "Issue to Member Only".

11.1.1.10 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.1.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Benefits tab of the Issue Benefits dialog.

11.1.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "Issue Benefits".

- The Benefits tabbed page is displayed.

- The Household Member Information data grid is populated with members of the household assigned to the local clinic. (It is possible for members of a household to be assigned to different clinics for WIC program services and benefits.)

- The Benefits to be Issued tree view is populated with food instrument benefits prescribed to members of the household but not yet issued to them. The benefits are organized by the household members to whom they are prescribed.

- The Cycle Adjust to The Household Participant check box is disabled and cleared.

- The Mailing Benefits check box is cleared.

- The Generate Address Label check box is disabled and cleared.

Note: For EBT Clinics, the Mailing Benefits and Generate Address Label check boxes will not display.

11.1.2.2 Cycle Adjust to Household Member

When the Cycle Adjust to the Household Participant check box is selected, the icon of the selected Household Participant tree view node changes to indicate that the selected participant is the base participant. The icon of the previous base participant reverts to the appropriate icon. The benefit issuance defaults are recalculated based on the new base participant and the Benefits to be Issued tree view is updated.

11.1.2.3 Benefit Issuance

When the Print for Member Only button or Print for Household button is selected, the following processes are started:

11.1.2.3.1 Verify Synchronization of Benefit Issuance Cycle

If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a check is performed to ensure that the benefit issuance cycles for all household members are synchronized:

- If the benefit period of any household member is different from that of any other, a standard error dialog is invoked with the text, "The members of this household do not have synchronized benefit periods. Select a household member and check the 'Cycle Adjust to this Household Member' box to synchronize them."

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

11.1.2.3.2 Issue Benefits

When the above-listed edits are completed successfully, benefits are issued to the participant(s) as follows:

- If the Print for/Issue to Member Only button was selected:

  o If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, the Aggregated Issuance for EBT Account dialog defined in this document is invoked for the selected participant.

- o If the Check food delivery system is enabled for the clinic, instructions to print the current set of benefits for the household member selected in the Household Participant Information data grid are sent to the benefit printer specified on the Default Printer dialog defined in [Common Interface Panels Chapter S - System Tools](#).

- If the Print for/Issue to Household button was selected,

  - o If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, the Aggregated Issuance for EBT Account dialog defined in this document is invoked for the household.

  - o If the Check food delivery system is enabled for the clinic, instructions to print the current set of benefits for all household members with benefits listed in the Set of Benefits tree view are sent to the benefit printer specified on the Default Printer dialog defined in [Common Interface Panels Chapter S - System Tools](#).

11.1.2.3.3 Post Issuance Processes

When benefit issuance is complete, the post issuance processes are completed as follows:

11.1.2.3.3.1 Print Address Labels

If the Generate Address Label check box is selected, the Generate Address Label for Benefits dialog defined in [System Outputs Chapter 01 – System Outputs](#) is invoked.

Note: For EBT Clinics, the Generate Address Label check box will not display.

11.1.2.3.3.2 Capture the Benefit Recipient's Signature

If the Check food delivery system is enabled for the clinic, the Capture Electronic Signature dialog defined in this document is invoked.

11.1.2.3.3.3 Mark Appointment as Kept

If the participant has an appointment scheduled for the date of benefit issuance, the appointment is marked as kept. For more information on the process, see the Mark Appointment as Kept dialog defined in Clinic [Chapter 06 – Search-Selection](#).

When all processes are complete, the dialog is dismissed and focus is returned to the invoking window.

11.1.2.4 Preview Benefit

When the Preview Benefit button is selected, the Preview Benefits dialog defined in this document is invoked.

Note: For EBT Clinics, the Preview Benefits control will not display.

11.1.2.5 Edit First Set of Benefits

When the Edit First Set button is selected, the Edit First Set of Benefits dialog defined in this document is invoked.

11.1.2.6 Cancel

When the Cancel button is selected, the dialog is dismissed without issuing benefits and focus is returned to the invoking window.

11.2 Preview Benefits

The Preview Benefits dialog displays the benefits that will be issued prior to actual printing. The benefit number and MICR line will not be displayed in the report viewer. The Preview Benefits dialog is invoked when the user selects the Preview Benefits button on the Issue Benefits dialog.

Note: For EBT Clinics, the Preview Benefits dialog will not be available.

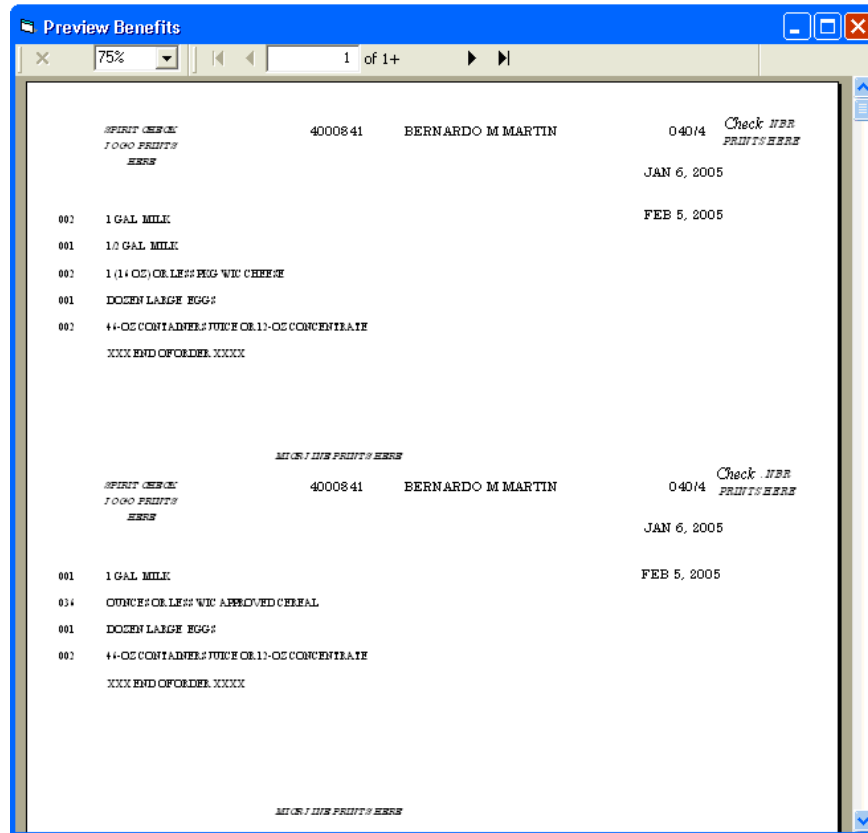**Figure 2 – Preview Benefits Dialog**

11.2.1 Controls

The benefits are displayed using the report viewer.

11.2.1.1 Benefit Logo

The logo will display.

11.2.1.2 Participant State WIC ID

The participant's state WIC ID will display.

11.2.1.3 Participant Name

The participant's full name will display.

11.2.1.4 ITO Agency Number / Clinic Number

The ITO Agency / Clinic numbers will display.

11.2.1.5 First Date to Use

The first date to use the benefit will display.

11.2.1.6 Last Date to Use

The last date to use the benefit will display.

11.2.1.7 Qty

The item quantity or the cash benefit amount will display.

11.2.1.8 Item Description

The description of the item will display.

11.2.2 Processes

11.2.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Preview Benefits".

- The text of the first 3 benefits to be printed will be automatically displayed.

- If a second page of benefits is available, the Next and End of Document buttons are enabled.

11.2.2.2 Exit

When the dialog is dismissed, focus is returned to the Issue Benefits (Benefits Tab) dialog defined in this document.

11.3 Edit First Set of Benefits

The Edit First Set of Benefits dialog allows the user to override the system proration suggestions and edit the package size of the first set of benefits to be issued. It is invoked when the user selects the Edit First Set of Benefits button on the Benefit tab of the Issue Benefits dialog defined in this document.
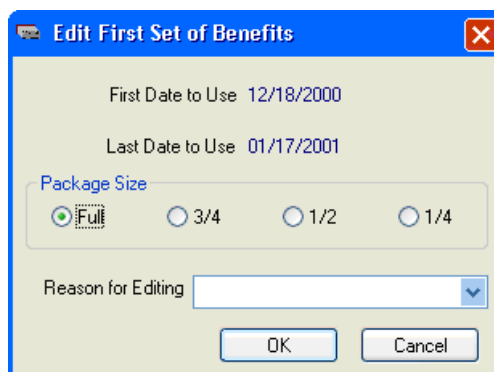

Figure 3– Edit First Set of Benefits Dialog

11.3.1 Controls

The section describes the behavior of the controls on the Edit First Set of Benefits dialog.

11.3.1.1 First Date to Use Text and Value Label

The control displays the first date to use of the set of benefits to be issued. The value label will be filled with the first date to use for the Set of Benefits tree view node selected in the Benefits to be Issued tree view on the Benefits tab of the Issue Benefits dialog. It displays in the inverse color of the form.

11.3.1.2 Last Date to Use Text and Value Label

The control displays the last date to use of the set of benefits to be issued. The value label will be filled with the last date to use for the Set of Benefits tree view node selected in the Benefits to be Issued tree view on the Benefits tab of the Issue Benefits dialog. It displays in the inverse color of the form.

11.3.1.3 Package Size Radio Button Group

The control allows the selection of the package size for the set of benefits to be issued. The radio button group is enabled if there has not been a set of benefits issued to the household participant selected in the Benefits to be Issued tree view on the Benefits tab of the Issue Benefits dialog. It includes the following radio buttons:

- Full

- ¾

- ½

- ¼

The Full radio button defaults to selected.

11.3.1.4 Reason for Editing Drop-down List

The control allows the selection of the reason the first set of benefits is being edited. It is enabled when the dialog is active. It is filled with a list of reasons for editing the first set of benefits from the reference dictionary table of the lookup database. It is initially blank.

11.3.1.5 OK Button

The control edits the values of the controls, applies the changes to the Set of Benefits tree view node, and exits the Edit First Set of Benefits dialog. It is enabled when the dialog is active. (See *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in the Consistencies chapter.

11.3.1.6 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.3.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Edit First Set of Benefits dialog.

11.3.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Edit First Set of Benefits".

- The First Date to Use value label will be set to the first use date of the selected benefits.

- The Last Date to Use value label will be set to the last use date of the selected benefits.

- The Package Size defaults to Full.

- The Reason for Editing drop-down list will be initially blank.

11.3.2.2 Edits

When the OK button is selected, if the Package Size radio button group has been enabled a check is performed to verify that values have been entered in the following controls. If no selection has been made, a standard error dialog is invoked with the text, "A selection is required in the {control label}":

- Package Size radio button group

- Reason for Editing drop-down list

11.3.2.3 Saving the Data

When the edits listed above have been completed successfully, the system will update the selected Set of Benefits tree view node in the Benefits to be Issued tree view on the Benefits tab of the Issue Benefits dialog with the values on the Edit First Set of Benefits dialog. The system returns to the Benefits tab of the Issue Benefits dialog.

11.3.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without editing the package size of the first set of benefits and focus is returned to the Issue Benefits dialog.

11.4 Capture Electronic Signature

The Capture Electronic Signature dialog allows the user to capture an electronic copy of the participant's signature for the WIC benefits they received. It is automatically invoked by the system after benefits have printed when an authorized signature is required for the issued benefits. For EBT issuances, this signature is not required.
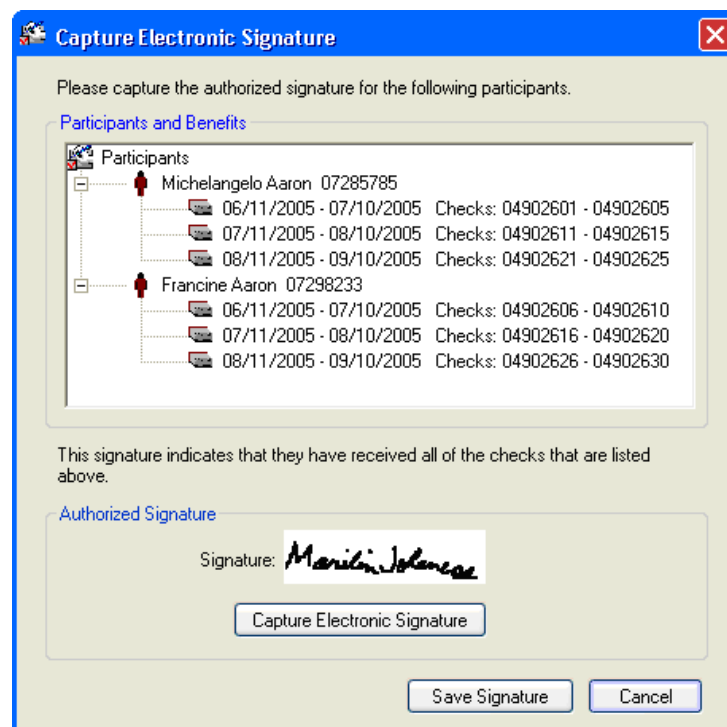

Figure 4– Capture Electronic Signature Dialog

11.4.1 Controls

The section describes the behavior of the controls on the Capture Electronic Signature dialog.

11.4.1.1 Participants and Benefits Tree View

The control displays the household participants who received benefits and the set(s) of benefits issued to each participant. It is enabled when the dialog is active. It includes the following hierarchical structure:

```
Participants Root
|
|_Household Participant Node
   |
   |_Set of Benefits Node
```

```
|_Set of Benefits Node
```

It is filled with all household participants who were issued benefits and the set(s) of benefits received by each participant. All nodes default to expanded. The values are read-only.

11.4.1.2 Household Participant Tree View Node

The node of the Participants and Benefits tree view displays the household participant who received benefits. The node will consist of an appropriate icon and text in the format of {First Name Middle Initial Last Name} {participant State WIC ID}. The Household Participant tree view nodes will be sorted in alphabetical order by last name then by first name. All of the Household Participant tree view nodes will be expanded.

11.4.1.3 Set of Benefits Tree View Node

The node of the Participants and Benefits tree view displays the set of benefits that were issued to the household participant. The node will consist of an appropriate icon and text in the format of {(first date to use) (last date to use)} Benefits: {first benefit number in set} – {last benefit number in set}. The Set of Benefits tree view nodes are sorted in chronological order by the first date to use.

11.4.1.4 Electronic Signature Picture Box and Value Label

The control displays the electronic signature for the participant after it is captured on the digital signature pad. The value is read-only.

11.4.1.5 Capture Electronic Signature Button

The Capture Electronic Signature button is enabled when the dialog is active. It has a mnemonic of "C".

11.4.1.6 Save Signature Button

The Save Signature button is enabled when the dialog is active. It has a mnemonic of "S".

11.4.1.7 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.4.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Capture Electronic Signature dialog.

11.4.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Capture Electronic Signature".

- The Participants and Benefits tree view will be populated with all of the household participants who received benefits and the set(s) of benefits that were issued to each participant.

- The Electronic Signature picture box will be blank.

11.4.2.2 Edits

When the Save Signature button is selected, if the Electronic Signature picture box does not contain a signature, a standard error dialog is invoked with the text, "Form must be signed to proceed further."

11.4.2.3 Capture Participant Signature

When the Capture Signature button is selected, the system will activate the digital signature pad.

The signature pad displays the participant names listed on the Capture Electronic Signature dialog so the participant can verify which participants require a signature for their benefits.

The signature pad will also display a message that explains to the participant that their signature indicates they have received all of the benefits with the benefit numbers listed on the pad.

Once the participant scrolls through all of the information the digital signature pad will prompt them for their signature. The invokes the eSign Signature Capture dialog defined in this document.

11.4.2.4 Save Signature and Continue

When the edits listed above have been completed successfully, the system saves the electronic signature information to the database and will return to the calling window.

11.4.2.5 Cancel

When the Cancel button is selected, the system displays a message with the text, "Are you sure you want to cancel this process and void benefits printed for this household?"

- Select 'No' – the system will return to the Capture Electronic Signature dialog without canceling.

- Select 'Yes'–

  o The system voids the range of serial numbers for the benefits printed for the selected household.

- o The dialog is dismissed and focus is returned to the calling window.

Note: It will be the responsibility of the Clinic to destroy the hard copy benefit that was printed.

11.5 eSign Signature Capture

The eSign Signature Capture dialog displays the participant's signature as it is entered on the digital signature pad. It is invoked when the user selects the Capture Electronic Signature button on the Capture Electronic Signature dialog.
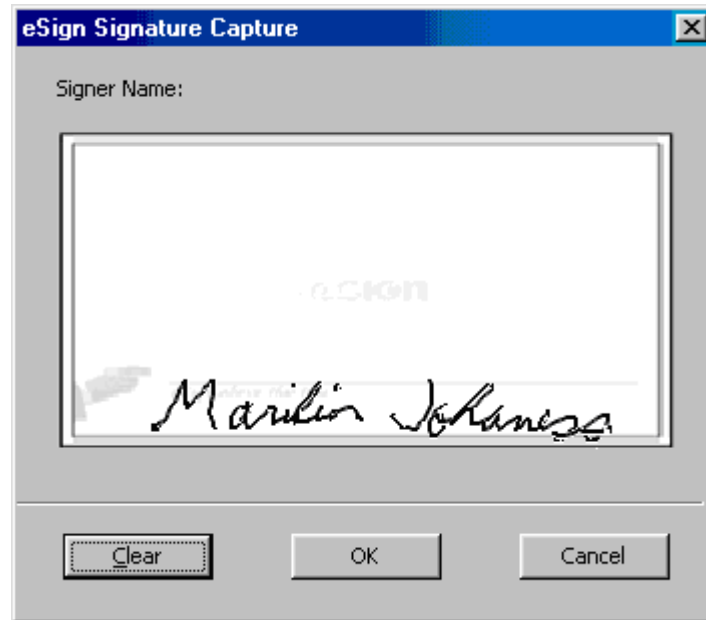

Figure 5– eSign Signature Capture Dialog

11.5.1 Controls

The section describes the behavior of the controls on the eSign Signature Capture dialog.

11.5.1.1 Participant Signature Display Box

The control displays the signature that was recorded on the digital signature pad. The value is read-only.

11.5.1.2 Clear Button

The Clear button is enabled when the dialog is active. It has a mnemonic of "C".

11.5.1.3 OK Button

It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

11.5.1.4 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

11.5.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the eSign Signature Capture dialog.

11.5.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "eSign Signature Capture".

- The Participant Signature display box is empty.

11.5.2.2 Edits

When the OK button is selected, the system will close the eSign Signature Capture dialog and pass the electronic signature information back to the Capture Participant Signature dialog.

11.5.2.3 Clear Signature

When the Clear button is selected, the system discards the signature information that was captured on the digital signature pad without closing the dialog. This allows the participant to enter their signature again when mistakes are made.

11.5.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the Capture Electronic Signature dialog.

11.6 Issue Benefits (Food Prescription Tab)

The Food Prescription tab of the Issue Benefits dialog displays the food prescriptions for the participants of the household. It is invoked when the user selects the Food Prescription tab on the Issue Benefits dialog.
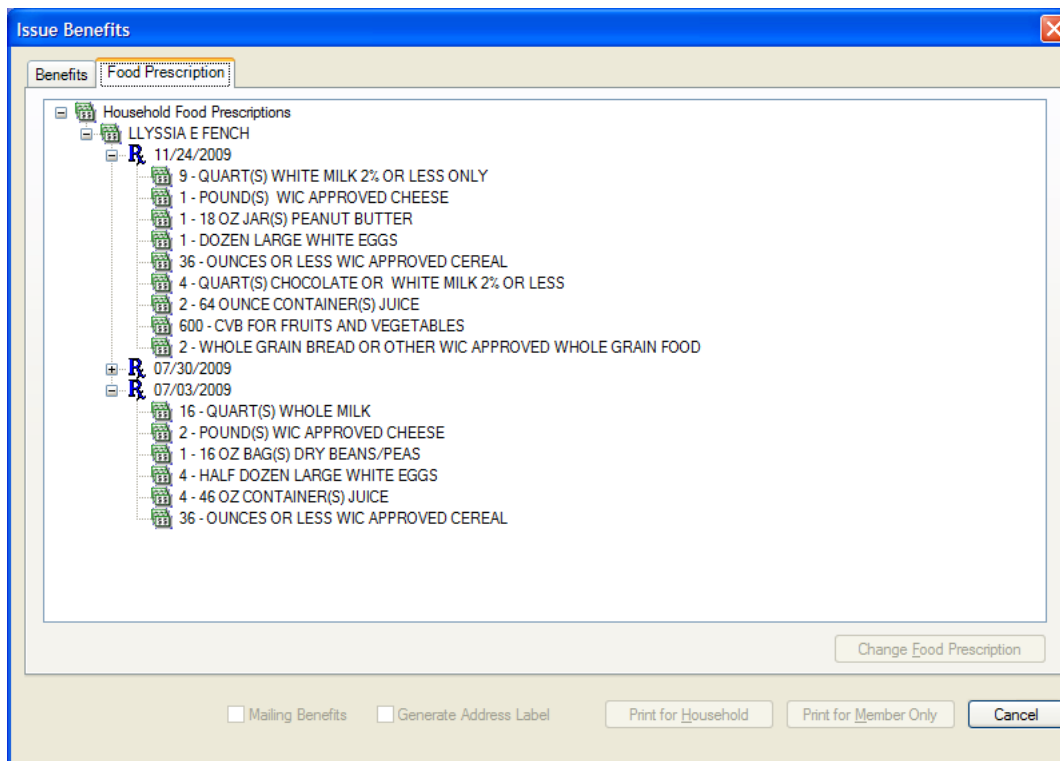

Figure 6– Issue Benefits Dialog (Food Prescription Tab)

11.6.1 Controls

The section describes the behavior of the controls on the Food Prescription tab of the Issue Benefits dialog.

11.6.1.1 Food Prescriptions Display Tree View

The control displays the food prescriptions for the household participants along with the food items that comprise the food prescriptions. It is enabled when the Food Prescription tab is active. The data is organized in the following hierarchical structure:

```
Food Prescriptions Root
|
|_Household Participant Node
  |
  |_Food Prescription Node
```

```
| |
| |_Food Item Node
| |_Food Item Node
| |_Food Item Node
|
 |_Food Prescription Node
```

It is filled with all existing food prescriptions for the household participants. The food prescriptions displays in chronological order according to the value of the food prescription effective date. The values are read-only.

11.6.1.2 Household Participant Tree View Node

The node of the Food Prescriptions Display tree view displays the household participant for whom the food prescription is made. The node will consist of an appropriate icon and text in the format of {first name}, {middle initial} {last name}. The Household Participant tree view node will be sorted in alphabetical order by last name then by first name. All Household Participant tree view nodes will be expanded.

11.6.1.3 Food Prescription Tree View Node

The node of the Food Prescriptions Display tree view displays the date on which the food prescription is to take effect. The node will consist of an appropriate icon and text in the format of {food prescription effective date (MM/DD/CCYY)}. The Food Prescription tree view nodes will be sorted in chronological order by food prescription effective date. The food prescription closest to the current system date (equal to or greater than the current system date) for each household participant defaults to expanded. All other food prescription nodes will be collapsed.

11.6.1.4 Food Item Tree View Node

The node of the Food Prescriptions Display tree view displays the food items that comprise a food prescription. The node will consist of an appropriate icon and text in the format of {quantity of food item or cash benefit amount} {description of food item}.

11.6.1.5 Change Food Prescription Button

The control allows the user to adjust the food prescriptions for the selected household participant. The Change Food Prescription button is enabled when a Household Participant tree view node is highlighted on the Food Prescriptions Display tree view. It has a mnemonic of "F".

When the Change Food Prescription button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Food Prescriptions.FullControl) to edit the food prescriptions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update food prescription information. Please see the supervisor."

11.6.1.6 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. The check box is not enabled when the Food Prescription tab is active.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

11.6.1.7 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. The check box is not enabled when the Food Prescription tab is active.

Note: For EBT Clinics, the Generate Address Label check box will not display.

11.6.1.8 Print for Household Button

The control prints the indicated sets of benefits for the household. The Print for Household button is not enabled when the Food Prescription tab is active.

Note: For EBT Clinics, this button will be titled "Issue to Household".

11.6.1.9 Print for Member Only Button

The control prints the indicated sets of benefits for the selected household participant. The Print for Member Only button is not enabled when the Food Prescription tab is active.

Note: For EBT Clinics, this button will be titled "Issue to Member Only".

11.6.1.10 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

11.6.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Food Prescription tab of the Issue Benefits dialog.

11.6.2.1 Initializing the Interface

When the dialog is invoked:

- The Household Food Prescriptions tree displays all participants within the household.

- The food prescription(s) for each household member displays in chronological order according to the value of the food prescription effective date.

11.6.2.2 Edits

There are no edits defined for this tab.

11.6.2.3 Change Food Prescription

When the Change Food Prescription button is selected, the system invokes the Food Prescription dialog defined in Common Interface Panels Chapter L – Food Prescription for participant selected in the Food Prescriptions Display tree.

11.6.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed and focus is returned to the calling window.

11.7 Issue Benefits for Participants of On-site Households (Process)

The Issue Benefits for Participants of On-site Households process attempts to produce food instruments for those participants of the selected households who are eligible. The households are selected from the Households On-site data grid on the Work with On-site Group dialog defined in <u>Clinic Chapter 06 – Search-Selection</u>. the system invokes the Issue Benefits for Participants of On-site Households process if the Issue Benefits check box is selected when the Apply or OK button is selected.

11.7.1 Controls

The process is a non-interactive process. It does not have a dialog associated with it, although it calls other dialogs.

11.7.2 Processes

The section describes the processes that take place as part of the Issue Benefits for Participants of On-site Households process.

11.7.2.1 Display Progress Bar

During the Issue Benefits for Participants of On-site Households process, a progress bar displays at the bottom of the Work with On-site Group dialog to show the status of the process.

11.7.2.2 Determine the Order to Issue Benefits

When the Issue Benefits process is started, the system determines the order in which benefits should be issued to households included in the on-site group. The order in which benefits are printed for the on-site households is determined by the OnPremisesDTTM column of the MEMBER table. The system checks the members of each household to determine the earliest time at which a member was marked as on-site. The earliest on-site time for each household is used to rank the households chronologically in ascending order.

11.7.2.3 Determine Benefits to Issue

When the Issue Benefits process is started, the system determines the benefits that should be issued for the households included from the on-site group. For each household, the system determines which household participants are eligible to receive benefits and the set(s) of benefits to issue to each participant.

The system takes into account the following factors when determining the benefits to issue to each household:

- Cycle Adjustment– the system issues sets of benefits such that the participants of the household can pick up benefits at the same time.

- Issuance Frequency– the system issues the number of sets of benefits for a household participant according to the issuance frequency specified by the CPA in the CPA-Determined Follow-up dialog defined in Common Interface Panels Chapter O – CPA Determined Follow-up.

- Late Pickup – The system adjusts the package size for the first set of benefits for the affected household participants if the benefits issued will cause the household participant to be late in picking up benefits.

- Certification End Date – The system does not issue benefits past the end of the month of the current certification period for the household participant.

- Previous Issuance – The system does not issue sets of benefits for a participation month in which the household participant has already received a set of benefits.

The global steps necessary to issue the correct sets of benefits to print for the household are as follows:

- Identify the base participant (the household participant to whom the system will cycle adjust)

- Determine the sets of benefits to issue for base participant

- Cycle adjust other household participants according to the sets of benefits to be issued for the base participant

- Prorate package sizes based on cycle adjusted sets

Each step is defined in detail below, and is repeated for each household included from the on-site group.

11.7.2.3.1 Identify the Base Participant

The system determines the participant who has the longest continuous participation on the WIC program by checking the certification records for the participant. There may not be any gaps between the end date of one certification and the beginning date of the next certification period to count as a continuous certification. The participant with the longest continuous certification is considered the base participant, unless that participant will be categorically ineligible at the time of issuance of the first set of benefits. In this case, the system checks for the next longest certification. The algorithm is repeated until the base participant is found.

If all household participants have equal lengths of continuous certifications, or the system does not have adequate information due to in-state or out-of-state transfers, the system determines the base participant according to the following rules:

- The system starts with the oldest infant or child in the household whose certification end date is greater than the current system date.

- If the participant will be categorically ineligible before the end of the current certification, the system skips to the next oldest household participant.

- If the participant has not yet received benefits for the current participation month, the system determines the first date to use for the first set of benefits for the participant. If this date is past the certification end date for the current certification of the participant, the system skips to the next oldest household participant.

- The resulting participant is the base participant.

11.7.2.3.2 Determine Set of Benefits to Issue for Base Participant

The following steps are performed to determine the sets of benefits that should be issued to the base participant:

If the certification period of the base participant ends before any benefits would be generated according to following steps, no sets of benefits will be issued for any household participant.

If the participant is a partially breastfeeding woman in a valid certification period who has a linked infant that is more than six (6) months and is getting more than the allowed maximum amount of formula, no sets of benefits will be issued for the base participant.

If no previous benefits are present for the current certification period for the base participant, both the expected and actual first date to use for the first set of benefits will be the current system date. The last date to use for the first set of benefits will be the number of days in the current month after the first date to use.

If two sets of benefits are issued and outstanding for the participant (two sets with a first date to use greater than the current system date), no sets of benefits will be issued.

If previous benefits are present for the current certification period, the expected first date to use is one day after the last date to use for the last set of benefits issued for the current certification period. This is the date shown on the hard copy benefit as the first date to use even if the participant is late picking up benefits. The purpose of printing this date along with the calculated last date to use is to show the complete benefit period as requested by FNS. The actual first date to use is the later of the expected first date to use or the current system date so that it reflects the actual pick up date. The actual first date to use is carried in the food instrument set table, but is not shown on the hard copy of the benefit. The last date to use for the first set of benefits will be the number of days in the current month after the expected first date to use.

If the last date to use is before the current system date, the expected first date to use becomes one day after the last date to use. The new last date to use will be the number of days in the current month after the expected first date to use. The algorithm will be repeated until the last date to use is greater than the current system date.

Once the first set of benefits has been determined, the system issues up to two additional sets of benefits with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.

- The first date to use is greater than the certification end date for the current certification.

- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)

- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).

11.7.2.3.3 Cycle Adjustment of Household Participants

Once the first set of benefits has been determined for the base participant, the system determines the sets of benefits to be issued for each additional household participant as follows:

The system determines the first set of benefits to be issued for the household participant according to the rules specified above for the base participant.

The system searches for the most recent historical or suggested issuance for the base participant where the actual first date to use is less than or equal to the actual first date to use for the current participant. The system sets the last date to use for the current participant to the same date as the last date to use for the base participant.

Once the first set of benefits has been determined, the system suggests up to two additional sets of benefits with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.

- The first date to use is greater than the certification end date for the current certification.

- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)

- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).

- The first date to use for the set is greater than the first date to use for the last set suggested for the base participant.

11.7.2.3.4 Create Partial Month Issuance Based on Cycle-Adjusted Sets

Once sets of benefits have been determined for each household participant, the system determines the prorating of package sizes for the first set of benefits for each household participant according to the following:

The system calculates the number of days between the actual first date to use and the last date to use for the set of benefits. The upper limit for each food package size is stored in the following business rules:

- For participants with a WIC status of Infant:

  o I_Max_Days_Quarter_Package (¼Max)

  o I_Max_Days_Half_Package (½Max)

  o I_Max_Days_Three_Quarter_Package (¾Max)

- For participants with a WIC status of Child:

  o C_Max_Days_Quarter_Package (¼Max)

  o C_Max_Days_Half_Package (½Max)

  o C_Max_Days_Three_Quarter_Package (¾Max)

- For participants with a WIC status of Breastfeeding:

  o B_Max_Days_Quarter_Package (¼Max)

  o B_Max_Days_Half_Package (½Max)

  o B_Max_Days_Three_Quarter_Package (¾Max)

- For participants with a WIC status of Pregnant:

  o P_Max_Days_Quarter_Package (¼Max)

  o P_Max_Days_Half_Package (½Max)

- o P_Max_Days_Three_Quarter_Package (¾Max)

- For participants with a WIC status of Non-breastfeeding:

  - o N_Max_Days_Quarter_Package (¼Max)

  - o N_Max_Days_Half_Package (½Max)

  - o N_Max_Days_Three_Quarter_Package (¾Max)

Note: The upper limit for a Full package is not required as it is always the number of days in the issuance month:

For infants, the following chart shows the partial month issuance for formula:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1 – ½Max	½ package
½Max+1 – ¾Max	¾ package
¾Max+1 – Total Number of Days in Issuance Month	Full package

For women and children, the following chart shows the partial month issuance for milk and juice:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1 – ¼Max	¼ package
¼Max+1 – ½Max	½ package
½Max+1 – ¾Max	¾ package
¾Max+1 – Total Number of Days in Issuance Month	Full package

11.7.2.4 Print Benefits

Once the system has determined the benefits to issue for the household, it will send print instructions to the Benefit Printer defined in System Tools for the sets of benefits to be issued to the household participants.

11.8 Add/Replace Set of Benefits

The Add/Replace Set of Benefits dialog allows the user to add a set of benefits to compensate the participant for a late scheduled subsequent certification appointment, or replace sets of benefits for a food prescription change. It is invoked when the user selects the Add/Replace Set of Benefits menu item from the Benefit Management menu defined in Clinic Chapter 9 – Participant Folder.

Figure 7– Add/Replace Set of Benefits Dialog

11.8.1 Controls

The section describes the behavior of the controls on the Add/Replace Set of Benefits dialog.

11.8.1.1 Dialog Function Radio Button Group

The control group allows the user to indicate the function to be performed by the Add/Replace Set of Benefits dialog. The radio button group includes the following radio buttons:

- Add Set (for Late Scheduling of Subsequent Certification Appointment)

- Replace Sets (for Food Prescription Change)

The Add Set radio button is enabled when either of the following pairs of conditions is met:

- a set of benefits has not been issued with a first date to use that is past the certification end date of the current certification period of the participant

- the current system date is less than or equal to 30 days before the certification end date of the current certification

OR

- the participant is no longer in a valid certification period

- the current system date is less than or equal to the next Expected Last Date to Use which occurs after the certification end date

The Add Set radio button is always disabled when a participant has outstanding paper checks in an EBT-enabled clinic.

The Replace Sets radio button is enabled when there are sets of benefits issued to the participant with a last date to use that is greater than the current system date.

If the Replace Sets radio button is enabled, it defaults to selected. If the Replace Sets radio button is disabled and the Add Set radio button is enabled, the Add Set radio button defaults to selected. If neither radio button is enabled, a standard error dialog is invoked with the text, "A set of benefits can not be added or replaced for this participant." The system exits the Add/Replace Set of Benefits dialog.

When the Add Set radio button is selected, the system will disable the Currently Outstanding Sets of Benefits data grid and will enable the following controls:

- Last Date to Use masked edit box

- Package Size radio button group

When the Replace Sets radio button is selected, the system will enable the Currently Outstanding Sets of Benefits data grid and will disable the following controls:

- Last Date to Use masked edit box

- Package Size radio button group

11.8.1.2 First Date to Use Text and Value Label

The control displays the first date to use for the set of benefits to be issued. The value label will be filled with the value of the certification end date for the current certification period of the participant. It displays in the inverse color of the dialog.

11.8.1.3 Last Date to Use Masked Edit Box

The control accepts the entry of the last date to use for the set of benefits to be issued. It is enabled when the Add Set radio button is selected. It allows the entry of numeric characters. The mask for the box is "##/##/####" to accept a date with a four digit year. It defaults to the date that is the number of days in the current month past the value of the First Date to Use value label.

11.8.1.4 Package Size Radio Button Group

The control allows the selection of the package size for the set of benefits to be issued. The radio button group is enabled when the Add Set radio button is selected. It includes the following radio buttons:

- Full
- ¾
- ½
- ¼

The Full radio button defaults to selected.

11.8.1.5 Currently Outstanding Sets of Benefits Data Grid

The control displays the outstanding set(s) of benefits for the participant and allows the selection of those to be replaced. It is enabled when the Replace Sets radio button is selected. It includes the following columns:

- Select
- Expected First Date to Use
- Actual First Date to Use
- Last Date to Use
- Participation Month/Year

The data grid includes an entry for each set of benefits issued for the participant with a last date to use equal to or greater than the current system date. The data grid is sorted in chronological order by the value of the Expected First Date to Use column. A mark may be placed in the Select fields of each outstanding set of benefits to be replaced. The values in the remaining fields are read-only.

11.8.1.6 Note Text Box

The control accepts the entry of a note regarding the replacement of benefits. It is enabled when the dialog is active. It is initially blank.

11.8.1.7 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. It is enabled when the dialog is active. It is cleared.

11.8.1.8 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. It is enabled when the Mailing Benefits check box is selected. It is disabled and cleared.

11.8.1.9 OK Button

The control edits the values of the controls, adds or replaces the indicated benefits, and exits the Add/Replace Set of Benefits dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the <u>Consistencies</u> chapter.

11.8.1.10 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

11.8.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Add/Replace Set of Benefits dialog.

11.8.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Add/Replace Set of Benefits".

- The Add Set radio button is enabled when either of the following pairs of conditions is met:

  o A set of benefits has not been issued with a first date to use that is past the certification end date of the current certification period of the participant.

  o The current system date is less than or equal to 30 days before the certification end date of the current certification.

  OR

  o The participant is no longer in a valid certification period.

  o The current system date is less than or equal to the next Expected Last Date to Use which occurs after the certification end date.

- The Replace Sets radio button is enabled when there are sets of benefits issued to the participant with a last date to use that is greater than the current system date.

- If the Replace Sets radio button is enabled, it defaults to selected.

- If the Replace Sets radio button is disabled and the Add Set radio button is enabled, the Add Set radio button defaults to selected.

- If neither radio button is enabled, a standard error dialog is invoked with the text, "A set of benefits can not be added or replaced for this participant." When the dialog is dismissed, the system exits the Add/Replace Set of Benefits dialog.

- The Note text box is blank.

- The Mailing Benefits check box is cleared.

- The Generate Address Label check box is disabled and cleared.

11.8.2.2 Edits

When the OK button is selected, a check is performed to verify that a selection is made in the Dialog Function radio button group. If a selection is not made in the control, a standard error dialog is invoked with the text, "Either the Add Set or Replace Sets radio button must be selected in order to perform a function."

If the Add Set radio button is selected, the value of the Last Date to Use masked edit box must be a date equal to or greater than the current system date. It also must be a date less than or equal to the next expected Last Date to Use which occurs after the certification end date.

If the Add Set radio button is selected, a value must be entered in the Last Date to Use masked edit box. Otherwise, the system displays an error message with the text, "An entry is required for the {control label}."

If the Add Set radio button is selected, the value of the Last Date to Use masked edit box must be greater than or equal to the value of the First Date to Use value label but must not be greater than the date which is the number of days in the current month past the value of the First Date to Use value label. Otherwise the system displays an error message with the text, "Date must be greater than or equal to the First Date to Use and no more than 30 days greater than today's date."

If the Replace Sets radio button is selected, at least one entry in the Currently Outstanding Set of Benefits data grid must be marked in the Select field.

11.8.2.3 Add Set of Benefits

When the edits listed above have been completed successfully, if the Add Set radio button is selected, the system will print the set of benefits specified by the values in the Last Date to Use masked edit box and Package Size radio button group.

11.8.2.4 Replace Set(s) of Benefits

When the edits listed above have been completed successfully, if the Replace Sets radio button is selected, the system will print the set(s) of benefits specified by the selected entries in the Currently Outstanding Set of Benefits data grid.

Any Note entered will be saved as a general note in the HealthNote table as documented in the View Notes for Household Member section of Clinic Chapter 9– Participant Folder.

11.8.2.5 Generate Address Label

When the edits listed above have been completed successfully, if the Generate Address Label check box is selected, the system invokes the Generate Address Label for Benefits dialog defined in System Outputs Chapter 01 – System Outputs.

11.8.2.6 Capture Electronic Signature

When the edits listed above have been completed successfully, if an authorized signature is required for the issued benefits, the system invokes the Capture Electronic Signature dialog defined in this document.

11.8.2.7 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.9 Identify Benefits to Void

The Identify Benefits to Void dialog displays benefits issued at the selected clinic that have been issued to participants of the household and select which must be voided.

- For non-EBT enabled clinics, the dialog is invoked when the user selects the Void Benefits Issued at This Clinic menu item from the Benefit Management menu defined in Clinic Chapter 09 – Participant Folder.

- For non-EBT enabled clinics, the dialog is invoked when the user selects the Void Benefits Issued at This Clinic menu item from the Benefit Management menu defined in Clinic Chapter 09 – Participant Folder for participants who have outstanding paper checks.

- For EBT enabled clinics, the dialog is invoked when the user selects the Food Adjustment Wizard menu option on the Benefit Management Menu defined in Clinic Chapter 09 – Participant Folder, selects the Void Future Benefits radio button, and clicks the OK button.

Figure 8– Identify Benefits to Void Dialog

11.9.1 Controls

The section describes the behavior of the controls on the Identify Benefits to Void dialog.

11.9.1.1 Check Stock Type Radio Button Group

The control allows the selection of the check stock type of the benefits to be voided. It is enabled for non-EBT clinics when the dialog is active. The radio button group includes the following radio buttons:

- WIC– designates that upon selection of Apply Filter, display WIC benefits in the Benefits data grid.

- Farmers Market– designates that upon selection of Apply Filter, display Farmers Market benefits in the Benefits data grid.

11.9.1.2 Apply Filter Button

The control retrieves benefits from the database that match the type of check stock selected in the Check Stock Type radio button group and displays them in the Benefits data grid. It is enabled for non-EBT clinics when the dialog is active. It has a mnemonic of "A".

11.9.1.3 Benefits Data Grid

The control displays the benefits issued to participants of the household and select one or more of them to be voided. For non-EBT clinics, the data grid is enabled when a check stock type has been selected and the Apply Filter button has been selected. For EBT clinics, the data grid is enabled when the dialog is active. It includes the following columns:

- Select

- Participant Name

- Check Number (non-EBT clinics only)

- First Date to Use

- Last Date to Use

- Date Issued

The data grid includes an entry for the selected check stock type (non-EBT clinics) or EBT issuances (EBT clinics), and for each benefit issued to participants of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by participant last name and then the value of the First Date to Use field. A mark may be placed in the Select field of each outstanding benefit to be voided. The values in the remaining fields are read-only.

When a row is selected in the grid, the contents of the Food Items on Currently Selected Check data grid will be refreshed.

11.9.1.4 Food Items on Currently Selected Food Instrument Data Grid

The control displays the food items on the benefit selected in the Benefits data grid. It is enabled when the dialog is active. It includes the following columns:

- Quantity

- Description

The data grid includes an entry for each food item on the benefit selected on the Benefits data grid. The values are read-only.

11.9.1.5 OK Button

The control edits the values of the controls and proceeds to the Confirm Benefits to Void dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

11.9.1.6 Send EBT Data Button

The control allows the user to negotiate a connection with the online EBT system, execute the transaction, and then save the data changes to the SPIRIT database upon success. It is enabled when the dialog is active. It will be disabled once the control is clicked.

11.9.1.7 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.9.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Identify Benefits to Void dialog.

11.9.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Identify Benefits to Void".

- The WIC is selected under Check Stock Type (for non-EBT clinics).

- The Benefits data grid displays an entry for each benefit issued to a member of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by participant last name and then First Date to Use. No check boxes in the Select fields are initially selected.

- The first record in the Benefits data grid is highlighted.

- The Food Items on Currently Selected Check displays all Food Items for the benefit selected in the Benefits data grid.

11.9.2.2 Edits

For non-EBT clinics:

- When the OK button is selected, the system will verify that at least one entry is marked in the Select fields of the Benefits data grid. If a selection is not made in the Select field, a standard error dialog is invoked with the text, "At least one benefit must be selected".

- If no benefits are displayed in the Benefits data grid, a standard error dialog is invoked with the text, "There are no benefits listed to void. Please specify Check Stock Type and press the Apply Filter button to retrieve a list of outstanding benefits for this participant."

For EBT clinics:

- When the Send EBT Data button is selected, the following processes are started:

11.9.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- The system will verify that at least one entry is marked in the Select fields of the Benefits data grid. If a selection is not made in the Select field, a standard error dialog is invoked with the text, "At least one benefit must be selected".

11.9.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All selections are considered legitimate.

11.9.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

11.9.2.2.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.

- The operation data is collected and a request passed to the SPIRIT Web Service.

- The timeout period is read from the State Business Rules (EBT_CONNECTION_TIMEOUT).

- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.

- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.

- When the process is completed successfully, all future household benefits for the selected benefit period(s) will be voided in the SPIRIT system. Amounts that were given to the other household members will then be reissued.

- If the process is not completed successfully, an error message will display in the Status text. The future household benefits for the selected benefit period(s) will not be voided in the SPIRIT system and will not be available for reissuance.

11.9.2.3 Confirm Benefits to Void

When the edits listed above have been completed successfully, the system invokes the Confirm Food Instrument Issued at The Clinic to Void dialog defined in this document.

11.9.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.10 Confirm Benefits Issued at The Clinic to Void

The Confirm Benefits to Void dialog allows the user to confirm that the selected benefits are to be voided and optionally reprinted or reissued. It is invoked when the user selects the OK button (for non-EBT clinics) or Send EBT Data button (for EBT clinics) on the Identify Benefits to Void dialog when at least one benefit is selected in the Benefits data grid.

Figure 9– Confirm Benefits to Void Dialog

11.10.1 Controls

The section describes the behavior of the controls on the Confirm Benefits to Void dialog.

11.10.1.1 Benefits to be Voided Data Grid

The control displays the benefit(s) that were selected on the Identify Benefits to Void dialog and confirms that the correct benefits will be voided. It is enabled when the dialog is active. It includes the following columns:

- Check Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

The data grid includes an entry for each benefit marked as selected in the Benefits data grid on the Identify Benefits to Void dialog. The data grid is sorted by participant last name and then the value of the First Date to Use field. The values are read-only.

11.10.1.2 Reason for Voiding Drop-down List

The control allows the selection of the reason the benefits on the Benefits data grid are to be voided. It is enabled when the dialog is active. It is filled with a list of void reasons from the reference dictionary table of the lookup database. It is initially blank.

11.10.1.3 Reprint/Reissue Benefits Check Box

The control allows the user to indicate that the system should reprint or reissue the benefits after they have been voided. It is enabled when the dialog is active. It is cleared.

11.10.1.4 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. It is enabled for non-EBT clinics when the Reprint Benefits check box is selected. It is cleared.

11.10.1.5 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. It is enabled for non-EBT clinics when the Mailing Benefits check box is selected. It is disabled and cleared.

11.10.1.6 OK Button

The control voids the benefits in the Benefits to be Voided data grid and to reprints the benefits if necessary. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

11.10.1.7 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.10.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Benefits to Void dialog.

11.10.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Confirm Benefits to Void".

- The data grid includes an entry for each benefit marked as selected in the Benefits data grid on the Identify Benefits to Void dialog. The data grid is sorted by participant last name and then the value of the First Date to Use field.

- The Reason for Voiding drop-down list will be initially blank.

- The Reprint/Reissue Benefits check box is cleared.

- The Mailing Benefits check box is cleared (for non-EBT clinics).

- The Generate Address Label check box is disabled and cleared (for non-EBT clinics).

11.10.2.2 Edits

When the OK button is selected, a check is performed to verify that a selection is made in the Reason for Voiding drop-down list. If a selection is not made in the drop-down list, a standard error dialog is invoked with the text, "A selection is required in the Reason for Voiding."

11.10.2.3 Void Benefits

When the edits listed above have been completed successfully, the system voids the benefits listed in the Benefits to be Voided data grid with the reason specified in the Reason for Voiding drop-down list.

11.10.2.4 Reprint/Reissue Benefits

When the edits listed above have been completed successfully, if the Reprint/Reissue Benefits check box is selected, new benefits with food items, quantities and dates to use identical to the benefits listed in the Benefits to be Voided data grid are generated and, for non-EBT clinics, sent to the benefits printer selected on the Default Printers dialog defined in Common Interface Panels Chapter S - System Tools. For EBT clinics, reissued benefits will be sent through the EBT system.

11.10.2.5 Generate Address Label

For non-EBT clinics, when the edits listed above have been completed successfully, if both the Reprint Benefits and Generate Address Label check boxes are checked the system invokes the Generate Address Label for Benefits dialog defined in System Outputs Chapter 01 – System Outputs.

11.10.2.6 Capture Electronic Signature

When the edits listed above have been completed successfully, if the Reprint Benefits check box is selected and an authorized signature is required for the issued benefits the system invokes the Capture Electronic Signature dialog defined in this document.

11.10.2.7 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.11 Void Benefits Issued at Another Clinic

The Void Benefits Issued at Another Clinic dialog allows the user to void a benefit issued at a clinic other than the current clinic (or affiliated satellite sites). It is invoked when the user selects the Void Benefits Issued at Another Clinic menu item from the Benefit Management menu defined in Clinic [Chapter 09 – Participant Folder](#). The function may not be available in your state.
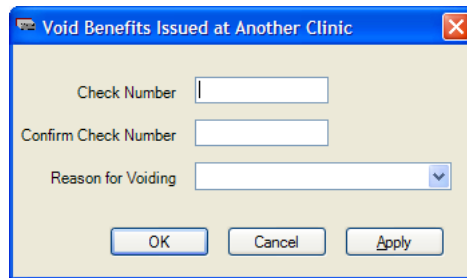
Figure 10– Void Benefits Issued at Another Clinic Dialog

11.11.1 Controls

The section describes the behavior of the controls on the Void Benefits Issued at Another Clinic dialog.

11.11.1.1 Check Number Masked Edit Box

The control accepts the entry of the check number of the benefit to void that was issued at another clinic. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "########". It is initially blank.

11.11.1.2 Confirm Check Number Masked Edit Box

The control allows the user to confirm the check number of the benefit to void that was issued at another clinic. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "########". It is initially blank.

11.11.1.3 Reason for Voiding Drop-down List

The control allows the selection of the reason for which the benefit is to be voided. It is enabled when the dialog is active. It is filled with a list of void reasons from the reference dictionary table of the lookup database. It is initially blank.

11.11.1.4 OK Button

The control edits the values of the controls, voids the specified benefit, and exits the Void Benefits Issued at Another Clinic dialog. Previous benefits voided using the Apply button have already been modified in the database. It is enabled when the dialog is active. Characteristics for the OK button are defined in the <u>Consistencies</u> chapter.

11.11.1.5 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

11.11.1.6 Apply Button

The control allows the user void the specified benefit then continue editing the values of the controls and without exiting the Void Benefits Issued at Another Clinic dialog. It is enabled when the dialog is active. It has a mnemonic of "A".

11.11.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Void Benefits Issued at Another Clinic dialog.

11.11.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Void Benefits Issued at Another Clinic".

- All controls are initially blank.

11.11.2.2 Edits

When the OK button or Apply button is selected, a check is performed to verify that values have been entered in the following controls. Otherwise, a standard error dialog is invoked with the text, "An entry is required for the {control label}.":

- Check Number masked edit box

- Confirm Check Number masked edit box

The system checks that a selection has been made in the following controls. Otherwise, a standard error dialog is invoked with the text, "A selection is required in the {control label}."

The value entered in the Check Number masked edit box must be a valid check number. Otherwise, a standard error dialog is invoked with the text, "Invalid check number."

The value entered in the Check Number masked edit box must not be a check number of a benefit issued at the current clinic or an affiliated satellite site. Otherwise, a standard error dialog is invoked with the text, "The check number entered must be issued at a different clinic."

The value entered in the Confirm Check Number masked edit box must match the value entered in the Check Number masked edit box exactly. Otherwise, a standard error dialog is invoked with the text, "The Confirm Check Number must match the Check Number."

11.11.2.3 Void Benefit and Reset Dialog

When the Apply button is selected and the edits listed above are completed successfully, the system voids the benefit specified in the Check Number masked edit box with the reason specified in the Reason for Voiding drop-down list. The system continues to display the Void Benefits Issued at Another Clinic dialog and clears the values from the controls to accept further input.

11.11.2.4 Void Benefit and Close Dialog

When the OK button is selected and the edits listed above are completed successfully, the benefit specified in the Check Number masked edit box is voided. The Void Benefits Issued at Another Clinic dialog will be dismissed and returns focus to the calling dialog.

11.11.2.5 Cancel

When the Cancel button is selected, the dialog is dismissed without using any information captured by the dialog to void a benefit and focus is returned to the calling dialog. Previously entered values saved by selecting the Apply button will not be lost.

11.12 Identify Lost/Stolen Benefits

The Identify Lost/Stolen Benefits dialog displays benefits that have been issued and indicate which have been lost or stolen. The dialog is invoked when the user selects the Mark Benefits as Lost/Stolen menu item from the Benefit Management menu defined in Clinic Chapter 09 – Participant Folder.

Figure 11– Identify Lost/Stolen Benefits Dialog

11.12.1 Controls

The section describes the behavior of the controls on the Identify Lost/Stolen Benefits dialog.

11.12.1.1 Check Stock Type Radio Button Group

The control allows the selection of the check stock type of the benefits to be marked as lost or stolen. It is enabled when the dialog is active. The radio button group includes the following radio buttons:

- WIC– designates that upon selection of Apply Filter, display WIC benefits in the Benefits data grid.

- Farmers Market– designates that upon selection of Apply Filter, display Farmers Market benefits in the Benefits data grid.

11.12.1.2 Apply Filter Button

The control retrieves benefits from the database that match the type of check stock selected in the Check Stock Type radio button group and displays them in the Benefits data grid. It is enabled when the dialog is active. It has a mnemonic of "A".

11.12.1.3 Benefits Data Grid

The control displays the benefits issued to participants of the household and select which ones were lost or reported as stolen. It is enabled when the dialog is active. It includes the following columns:

- Select

- Participant Name

- Check Number

- First Date to Use

- Last Date to Use

- Date Issued

The data grid includes an entry for each benefit issued to members of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by the value of the First Date to Use field. A mark may be placed in the Select field of each outstanding benefit that was lost or reported as stolen. The values in the remaining fields are read-only.

When a row is selected in the grid, the contents of the Food Items on Currently Selected Check data grid will be refreshed.

11.12.1.4 Food Items on Currently Selected Check Data Grid

The control displays the food items on the benefit selected in the Benefits data grid. It is enabled when the dialog is active. It includes the following columns:

- Quantity

- Description

The data grid includes an entry for each food item on the benefit selected on the Benefits data grid. The values are read-only.

11.12.1.5 Reprint Reason Radio Button Group

The control allows the selection of the reason the benefits need to be reprinted. The radio button group is enabled when the dialog is active. It includes the following radio buttons:

- Lost

- Stolen

No radio button is selected.

11.12.1.6 OK Button

The control edits the values of the controls and proceeds to the Confirm Benefits to Mark as Stolen dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the <u>Consistencies</u> chapter.

11.12.1.7 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

11.12.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Identify Lost/Stolen Benefits dialog.

11.12.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Identify Lost/Stolen Benefit".

- The WIC is selected under Check Stock Type.

- The Benefits data grid displays an entry for each benefit issued to a member of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by participant last name and then First Date to Use. No check boxes in the Select fields are initially selected.

- The first record in the Benefits data grid is highlighted.

- The Food Items on Currently Selected Check displays all Food Items for the benefit selected in the Benefits data grid.

11.12.2.2 Edits

When the OK button is selected, a check is performed to verify that at least one entry is marked in the Select field of the Benefits data grid. If a selection is not made in the grid, a standard error dialog is invoked with the text, "At least one benefit must be selected."

The system also checks that a selection was made in the Reprint Reason radio button group. If a selection is not made a standard error dialog is invoked with the text, "A selection is required in the Reprint Reason".

11.12.2.3 Confirm Lost\Stolen Benefits

When the edits listed above have been completed successfully, the system invokes the Confirm Benefits to Mark as Lost/Stolen and Reprint dialog defined in this document.

11.12.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.13 Confirm Benefits to Mark as Lost/Stolen and Reprint

The Confirm Benefits to Mark as Lost/Stolen and Reprint dialog allows the user to confirm that the selected benefits are to be reported as lost or stolen and optionally reprinted. It is invoked when the user selects the OK button on the Identify Lost/Stolen Benefits dialog when at least one benefit is selected in the Benefits data grid.

Figure 12– Confirm Benefits to Mark as Lost/Stolen and Reprint Dialog

11.13.1 Controls

The section describes the behavior of the controls on the Confirm Benefits to Mark as Lost/Stolen and Reprint dialog.

11.13.1.1 Benefits to be Reported as Lost/Stolen Data Grid

The control displays the benefit(s) that were selected on the Identify Lost/Stolen Benefits dialog and confirm that the correct benefits will be marked as lost or stolen. It is enabled when the dialog is active. It includes the following columns:

- Check Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

The data grid includes an entry for each benefit marked as selected in the Benefits data grid on the Identify Lost/Stolen Benefits dialog. The data grid is sorted by the participant name and then value of the First Date to Use field. The values are read-only.

11.13.1.2 Reprint Reason Text and Value Label

The control displays the reason that the benefits are being reprinted. The value label will be filled with the selection that was made in the Reprint Reason Radio Button Group on the Identify Lost/Stolen Benefits dialog. It displays in the inverse color of the form.

11.13.1.3 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. It is enabled when the dialog is active. It is cleared.

11.13.1.4 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. It is enabled when the Mailing Benefits check box is selected. It is disabled and cleared.

11.13.1.5 OK Button

The control reports the benefits in the Benefits to be Reported as Lost/Stolen data grid as lost or stolen and reprints them. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

11.13.1.6 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.13.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Benefits to Mark as Lost/Stolen and Reprint dialog.

11.13.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Confirm Benefits to Mark as Lost/Stolen and Reprint".
- The grid displays all selected benefits to be marked as lost or stolen.
- The Reprint Reason displays the selection of 'Lost' or 'Stolen'.
- The Mailing Benefits check box is cleared.
- The Generate Address Label check box is disabled and cleared.

11.13.2.2 Edits

There are no edits defined for this dialog.

11.13.2.3 Mark Benefits as Lost and Reprint

When the OK button is selected, if the Lost radio button was selected on the Identify Lost/Stolen Benefits dialog, the system will mark the benefits in the Benefits to be Reported as Lost/Stolen data grid as lost, the FoodInstrument.LostDate will be set to the current system date, and the benefits will be reprinted.

11.13.2.4 Mark Benefits as Stolen and Reprint

When the OK button is selected, if the Stolen radio button was selected on the Identify Lost/Stolen Benefits dialog the system will mark the benefits in the Benefits to be Reported as Lost/Stolen data grid as stolen, the FoodInstrument.StolenDate will be set to the current system date, and the benefits will be reprinted.

11.13.2.5 Generate Address Label

When the OK button is selected, if the Generate Address Label check box is selected the system invokes the Generate Address Label for Benefits dialog defined in <u>System Outputs Chapter 01 – System Outputs</u>.

11.13.2.6 Capture Electronic Signature

When the edits listed above have been completed successfully, if an authorized signature is required for the issued benefits the system invokes the Capture Electronic Signature dialog defined in this document.

11.13.2.7 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.14 Identify Benefits to Reprint for Custody Change

The Identify Benefits to Reprint for Custody Change dialog displays benefits that have been issued. The dialog is invoked when the user selects the Reprint Benefits for Custody Change menu item from the Benefit Management menu defined in Clinic Chapter 09 – Participant Folder.

Figure 13– Identify Benefits to Reprint for Custody Change Dialog

11.14.1 Controls

The section describes the behavior of the controls on the Identify Benefits to Reprint for Custody Change dialog.

11.14.1.1 Check Stock Type Radio Button Group

The control allows the selection of the check stock type of the benefits to be reprinted for a custody change. It is enabled when the dialog is active. The radio button group includes the following radio buttons:

- WIC– designates that upon selection of Apply Filter, display WIC benefits in the Benefits data grid.

- Farmers Market– designates that upon selection of Apply Filter, display Farmers Market benefits in the Benefits data grid.

11.14.1.2 Apply Filter Button

The control retrieves benefits from the database that match the type of check stock selected in the Check Stock Type radio button group and displays them in the Benefits data grid. It is enabled when the dialog is active. It has a mnemonic of "A".

11.14.1.3 Benefits Data Grid

The control displays the benefits issued to participants of the household and select which to reprint for a custody change. It is enabled when the dialog is active. It includes the following columns:

- Select
- Participant Name
- Check Number
- First Date to Use
- Last Date to Use
- Date Issued

The data grid includes an entry for each benefit issued to members of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by the value of the participants name and then the value of the First Date to Use field. A mark may be placed in the Select field of each outstanding benefit to reprint for a custody change. The values in the remaining fields are read-only.

When a row is selected in the grid, the contents of the Food Items on Currently Selected Check data grid will be refreshed.

11.14.1.4 Food Items on Currently Selected Check Data Grid

The control displays the food items on the benefit selected in the Benefits data grid. It is enabled when the dialog is active. It includes the following columns:

- Quantity
- Description

The data grid includes an entry for each food item on the benefit selected on the Benefits data grid. The values are read-only.

11.14.1.5 OK Button

The control edits the values of the controls and proceeds to the Confirm Benefits to Reprint for Custody Change dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the [Consistencies](#) chapter.

11.14.1.6 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.14.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Identify Benefits to Reprint for Custody Change dialog.

11.14.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Identify Benefits to Reprint for Custody Change".

- The WIC is selected under Check Stock Type.

- The Benefits data grid displays an entry for each benefit issued to a member of the household, with a last date to use equal to or greater than the current system date. The data grid is sorted by participant last name and then First Date to Use. No check boxes in the Select fields are initially selected.

- The first record in the Benefits data grid is highlighted.

- The Food Items on Currently Selected Check displays all Food Items for the benefit selected in the Benefits data grid.

11.14.2.2 Edit for Required Entry in Controls

When the OK button is selected, a check is performed to verify that at least one entry is marked in the Select fields of the Benefits data grid. If a selection is not made in the grid, a standard error dialog is invoked with the text, "At least one benefit must be selected."

11.14.2.3 Confirm Benefits to Reprint

When the edits listed above have been completed successfully, the system invokes the Confirm Benefits to Reprint for Custody Change dialog defined in this document.

11.14.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.15 Confirm Benefits to Reprint for Custody Change

The Confirm Benefits to Reprint for Custody Change dialog allows the user to confirm that the selected benefits are to be reprinted. It is invoked when the user selects the OK button on the Identify Benefits to Reprint for Custody Change dialog when at least one benefit is selected in the Benefits data grid.
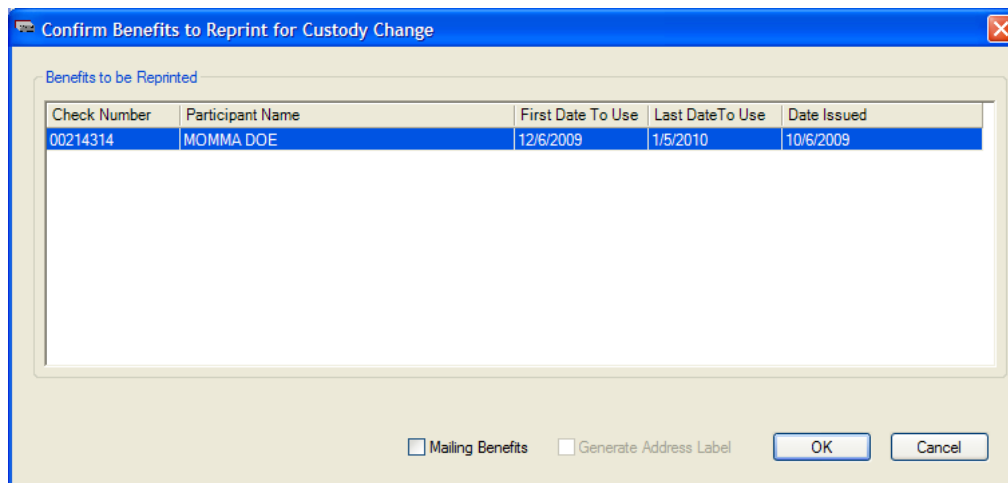

Figure 14– Confirm Benefits to Reprint for Custody Change Dialog

11.15.1 Controls

The section describes the behavior of the controls on the Confirm Benefits to Reprint for Custody Change dialog.

11.15.1.1 Benefits to be Reprinted Data Grid

The control displays the benefit(s) selected on the Identify Benefits to Reprint for Custody Change dialog and confirms that the correct benefits will be reprinted. It is enabled when the dialog is active. It includes the following columns:

- Check Number

- Participant Name

- First Date to Use

- Last Date to Use

- Date Issued

The data grid includes an entry for each benefit marked as selected in the Benefits data grid of the Identify Benefits to Reprint for Custody Change dialog. The data grid is sorted by the participants name and then the value of the First Date to Use field. The values are read-only.

11.15.1.2 Mailing Benefits Check Box

The control allows the user to indicate that the issued benefits will be mailed to the household of the participant. It is enabled when the dialog is active. It is cleared.

11.15.1.3 Generate Address Label Check Box

The control allows the user to specify that an address label should be produced for the household of the participant. It is enabled when the Mailing Benefits check box is selected. It is disabled and cleared.

11.15.1.4 OK Button

The control reprints the benefits in the Benefits data grid. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

11.15.1.5 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.15.2 Processes

The section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Benefits to Reprint for Custody Change dialog.

11.15.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Confirm Benefits to Reprint for Custody Change".

- The data grid includes an entry for each benefit marked as selected in the Benefits data grid of the Identify Benefits to Reprint for Custody Change dialog. The data grid is sorted by the participant's name and then the value of the First Date to Use field.

- The Mailing Benefits check box is cleared.

- The Generate Address Label check box is disabled and cleared.

11.15.2.2 Edits

There are no edits defined for this dialog.

11.15.2.3 Reprint Benefits

When the OK button is selected, new benefits with food items, quantities and dates to use identical to the benefits listed in the Benefits to be Reprinted data grid are generated and sent to the benefits printer selected on the Default Printers dialog defined in <u>Common Interface Panels Chapter S - System Tools</u>.

11.15.2.4 Generate Address Label

When the edits listed above have been completed successfully, if the Generate Address Label check box is selected the system invokes the Generate Address Label for Benefits dialog defined in <u>System Outputs Chapter 01 – System Outputs</u>.

11.15.2.5 Capture Electronic Signature

When the edits listed above have been completed successfully, if an authorized signature is required for the issued benefits the system invokes the Capture Electronic Signature dialog defined in this document.

11.15.2.6 Cancel

When the Cancel button is selected, the dialog is dismissed without saving and focus is returned to the calling window.

11.16 Printing Checks

Checks are printed on 3-up check stock, meaning that 3 blank checks are on each page. The system prints the logo (if provided), state WIC ID, participant name, ITO Agency number, Clinic number, first date to use, last date to use, issued date, quantity or cash benefit amount, redeemable food item description, system generated check number, and MICR line on each check.

Once a request has been made to print checks the application will attempt to locate the default check printer. (Refer to Common Interface Panels <u>Chapter S– System Tools</u>). If the default printer cannot be located (or the default has not been set) the application will prompt the user to select the printer (and paper source) using the Windows Print dialog. (Note that the application will not be capable of determining if the selected printer is MICR compatible, it is the responsibility of the user to select a printer that is supports MICR printing as well as the appropriate paper source for the printer.) Once a printer is selected and the print dialog is successfully dismissed the print job will be submitted to the printer and the application will ask the user if the selected printer should be set as the default check printer.

Checks are printed in sets, meaning that if checks are being printed for more than one household (as is the case when printing checks for the Work with On-site Group) the print job will be separated into sets.

If during the printing process one or more checks are damaged, the user will be able to specify the checks to be reprinted using the add/replace functionality from the Participant Folder application.

11.16.1 Selecting a Default Printer

The system recognizes 3 types of documents; checks, reports, and [all other] documents. The system is capable of storing a default printer for each of the document types as part of the user's profile. If the user's default printer for the document type is not defined, not found, or is invalid, the application will prompt the user to select a printer via the Windows Print dialog. If the user is prompted to select a printer the application will ask the user if the selected printer (and paper source) should be retained as the default printer for the selected document type.

11.17 EBT Household Demographics

The EBT Household Demographics dialog provides a means to set up and manage EBT account data, issue EBT cards, replace EBT cards, and transmit the information to the J.P. Morgan EBT system. It also provides a comprehensive summary of EBT demographic data.

NOTE: No actions performed or data updated on this dialog are saved to the database until the changes are successfully transmitted to the J.P. Morgan EBT system. The transmission can only be started by clicking Send EBT Data button.

The dialog is invoked by performing the following actions:

- Display the Participant Folder window defined in Clinic Chapter 09 - Participant Folder. On the Benefit Management menu, click EBT Household Demographics.

- Display the Certification Guided Script window defined in Clinic Chapter 10 - Certification Guided Script, and then do one of the following:

     o On the Guided Script menu, click EBT Household Demographics.

     o Under Certification Guided Script, click the EBT Household Demographics link.

- Display the Select Existing Household dialog defined in Clinic Chapter 12 - Participant Changes. Complete the required information. Click the OK button.

- Display the Create New Household dialog defined in Clinic Chapter 12 - Participant Changes. Complete the required information. Click the OK button.

- Display the Participant Folder window defined in Clinic Chapter 09 - Participant Folder. On the Demographics tab, change the Clinic Assigned field to transfer the user to a new clinic. If the new clinic is EBT enabled, the user will be prompted upon Save to communicate the changes to the EBT system.

- Display the Participant Folder window defined in Clinic Chapter 09 - Participant Folder. On the Demographics tab, change the participant's name, date of birth, or phone number. If the participant is the primary card holder for the household, the user will be prompted upon Save to communicate the changes to the EBT system.

- Display the EBT Household Change Guided Script dialog defined in Clinic Chapter 12 - Participant Changes. Select the Remove Cards link.

Figure 15 – EBT Household Demographics Dialog

11.17.1 Controls

This section describes the behavior of the controls on the EBT Household Demographics dialog.

11.17.1.1 Household ID Text Label and Value

The control displays the ID of the household. The value displays in the inverse color of the form.

11.17.1.2 Phone Number Text Label and Value

The control displays the contact telephone number for the household. The value displays in the inverse color of the form.

11.17.1.3 Address Text Label and Value

The control displays the street address for the household. The value displays in the inverse color of the form.

11.17.1.4 City Text Label and Value

The control displays the city in which the household is located. The value displays in the inverse color of the form.

11.17.1.5 Clinic Text Label and Value

The control displays the clinic to which the household is assigned. The value displays in the inverse color of the form.

11.17.1.6 Primary Card Holder Text Label and Value

The control displays the primary EBT card holder for the household. The value displays in the inverse color of the form.

11.17.1.7 Set as Primary Button

The control flags a row (household member or authorized representative) selected in the EBT Household Members data grid as the primary EBT card holder for the household. It is enabled when the dialog is active and a row containing a Card Number is selected in the EBT Household Members data grid.

11.17.1.8 Assign Card Button

The control allows an EBT card to be tentatively attached to a row (household member or authorized representative) selected in the EBT Household Members data grid. It is enabled when the dialog is active and a row that does not contain a Card Number is selected in the EBT Household Members data grid.

11.17.1.9 Disable Card Button

The control allows the EBT card to be tentatively disabled and/or a replacement card to be assigned for a row (household member or authorized representative) selected in the EBT Household Members data grid. It is enabled when the dialog is active and a row is selected in the EBT Household Members data grid that includes a Card Number.

11.17.1.10 EBT Household Members Data Grid

The control displays the participants and authorized representatives associated with the household. It is enabled when the dialog is active. It includes the following columns:

- State WIC ID
- Name
- Date of Birth
- Phone #
- Card Number

A row is added for each participant in the household and each authorized representative for the household. Clicking a row selects it. The values are read-only.

Rows are sorted numerically in descending order by State WIC ID. The authorized representatives for the household, who do not have State WIC IDs, are displayed last and will be sorted alphabetically by Name.

NOTE: The State WIC ID field displays the following text for authorized representatives, which do no have State WIC IDs assigned to them: "Authorized Rep:"

11.17.1.11 Status Text Label and Value

The control displays the status of the dialog. The value displays in the inverse color of the form.

11.17.1.12 Send EBT Data Button

The control processes the dialog and transmits the EBT household demographics information to the J.P. Morgan EBT system. It is enabled whenever a change has been made that affects any of the household demographics information. When changes to EBT household demographics information have been successfully transmitted to the EBT system, the changes are saved in the SPIRIT system, the button is disabled. It does not have a mnemonic.

11.17.1.13 Exit Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Exit button are defined in the Consistencies chapter.

11.17.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Household Demographics dialog.

11.17.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "EBT Household Demographics".

- The real-time list of active cards from the EBT system is displayed.

- All controls initially display the last value with which they were saved.

11.17.2.2 Set the Primary EBT Card Holder for the Household

When the Set as Primary button is selected, the row (household member or authorized representative) selected in the EBT Household Members data grid is flagged as the primary EBT card holder for the household.

The Primary Card Holder text value is updated to display the name of the household member or authorized representative so flagged, and the Status text value displays the following text: "EBT Update Required"

NOTE: The flagged row (household member or authorized representative) is only made the primary card holder after the Send EBT Data button is clicked.

11.17.2.3 Assign an EBT Card

When the Assign Card button is selected, the Assign Card dialog defined in this document is invoked for the row (household member or authorized representative) selected in the EBT Household Members data grid.

When the Assign Card dialog is successfully processed and focus is returned, the PAN captured is temporarily stored, and the Card Number field of the selected row (household member or authorized representative) is updated to display the PAN captured (or manually entered) through the dialog.

NOTE: The assignment of the EBT card identified by the captured PAN is only completed after the Send EBT Data button is clicked.

11.17.2.4 Disable an EBT Card

When the Disable Card button is selected, the active card number is cleared from the EBT Household Members data grid. The status label will update to display "Card has been disabled; send the change to the EBT system".

As previously described, the Assign Card dialog opens and allows the user to scan or type the PAN. If the user saves the card assignment to a household member that still has an active card in the EBT system, then the system considers it to be a Replacement Card Assignment.

The EBT Household Members data grid will be updated to show the replacement card number. The status label will update to display "Replacement Card has been assigned. Send the change to the EBT system".

NOTE: The disabling of an active card and replacement card assignment is only completed after the Send EBT Data button is clicked.

11.17.2.5 Send EBT Household Demographics Data

When the Send EBT Data button is selected, the following processes are started:

11.17.2.5.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

11.17.2.5.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

11.17.2.5.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

11.17.2.5.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.

- The operation data is collected and a request passed to the SPIRIT Web Service.

- The timeout period is read from the State Business Rules (EBT_CONNECTION_TIMEOUT).

- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.

- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.

- When the process is completed successfully, the EBT household demographic information is saved to the SPIRIT database and the dialog is dismissed.

- If the process is not completed successfully, an error message will display in the Status text. The EBT household demographic information will not be saved to the SPIRIT database.

- If the information sent to the J.P. Morgan EBT system includes the assignment of an EBT card, the Capture Electronic Signature dialog defined in Clinic Chapter 11 - Food Instrument Production is displayed to capture the signatures of the participants and authorized representatives that were issued an EBT card.

- Focus is returned to the calling window or dialog.

11.17.2.6 Exit

When the Exit button is selected, the dialog is dismissed without saving any changes, and focus is returned to the calling window or dialog

11.17.2.7 Data Map

Control Label	Table	Column	Business Rule
EBT Houshold Members Table			
State WIC ID column	EbtAuthorized RepresentativeData	StateWicID	
Name column			
Date of Birth column	EbtAuthorized RepresentativeData	DOB	
Phone # Column	EbtAuthorized RepresentativeData	Phone	
Card Number column			

11.18 Assign Card

The Assign Card dialog provides a means to issue an EBT card to a participant in the household or an authorized representative for the household.

The dialog is invoked by performing the following actions:

- Display the EBT Household Demographics dialog. Select a row in the EBT Household Members data grid. Click the Assign Card button.
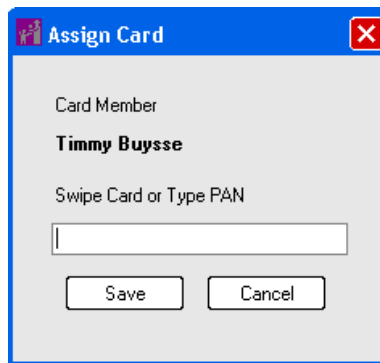

Figure 16 – Assign Card Dialog

11.18.1 Controls

This section describes the behavior of the controls on the Assign Card dialog.

11.18.1.1 Card Member Text Label and Value

The control displays the name of the participant to whom the EBT card will be issued. The value displays in the inverse color of the form.

11.18.1.2 Swipe Card or Type PAN Text Box

The control accepts the primary account number (PAN) for the EBT card to be issued. It is enabled when the dialog is active. Characteristics for the text box are defined in the Consistencies chapter under PAN #.

11.18.1.3 Save Button

The control processes the dialog. It is enabled when the dialog is active. Characteristics for the Save button are defined in the Consistencies chapter.

11.18.1.4 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.18.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Assign Card dialog.

11.18.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "Assign Card".

- The Swipe Card or Type PAN text box is blank.

11.18.2.2 Swipe EBT Card

If a magnetic card reader is connected to the computer, configured to work with the Clinic module, and functioning properly, a successful scan of an EBT card as it passes through the reader populates the Swipe Card or Type PAN text box with the PAN read from the EBT card.

11.18.2.3 Return PAN

When the Save button is selected, the following processes are started:

11.18.2.3.1 Verify Required Information

A check is performed to ensure required information is provided:

- If the Swipe Card or Type PAN text box does not contain a value, a standard error dialog is invoked with the text, "An entry is required for the Swipe Card or Type PAN."

11.18.2.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

11.18.2.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

11.18.2.3.4 Return Data

When the above-listed edits are completed successfully, and no errors are found:

- The dialog is dismissed, focus is returned to the EBT Household Demographics dialog, and the PAN is returned to the EBT Household Demographics.

11.18.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving any information and focus is returned to the EBT Household Demographics dialog.

11.19 Capture Signature for Card

The Capture Signature for Card dialog provides a means to capture a signature for EBT card transactions. The system will prompt the user for each card holder's signature after a card assignment has been successfully transmitted to the EBT system and saved to the SPIRIT database.

The dialog is invoked by performing the following actions:

- Display the EBT Household Demographics dialog. Assign a card to a participant by clicking the Assign Card button. Close the Assign Card dialog. Send the changes to EBT by clicking the Send EBT Data button. The system will display a standard confirmation message with the text, "Changes to the EBT household demographics saved". Click the OK button on the confirmation dialog.

Figure 17 – Capture Signature for Card Dialog

11.19.1 Controls

This section describes the behavior of the controls on the Capture Signature for Card dialog.

11.19.1.1 Card Number Text Value

The control displays the primary account number (PAN) for the EBT card that was assigned. The data value is read-only and displays in the inverse color of the form.

11.19.1.2 Card Holder Text Value

This control displays the Member.FirstName Member.LastName of the participant to whom the EBT card was assigned. The data value is read-only and displays in the inverse color of the form.

11.19.1.3 Electronic Signature Picture Box and Value Label

The control displays the electronic signature for the participant after it is captured on the digital signature pad. The value is read-only.

11.19.1.4 Capture Electronic Signature Button

The Capture Electronic Signature button is enabled when the dialog is active. It has a mnemonic of "C".

11.19.1.5 Save Signature Button

The Save Signature button is enabled when the dialog is active. It has a mnemonic of "S".

11.19.1.6 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.19.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Capture Signature for Card dialog.

11.19.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "Capture Signature for Card".

- The Card Number text value is populated with the PAN from the Assign Card dialog.

- The Card Holder text value is populated with the Member.FirstName Member.LastName of the participant from the Assign Card dialog.

- The Electronic Signature picture box will be blank.

11.19.2.2 Edits

Upon selection of the Save Signature button, if the Signature picture box does not contain a signature the system will invoke a standard message with the text "A signature was not collected. Please re-try to capture a signature."

11.19.2.3 Capture Card Holder Signature

Upon selection of the Capture Electronic Signature button, the system will invoke the eSign Signature Capture dialog defined in this document.

If a digital signature pad is not connected to the computer, the system will invoke a standard message with the text "Signature device is not connected to the computer".

11.19.2.4 Save Signature

Upon successful completion of the above-listed edits, the system will save the electronic signature information to the database.

11.19.2.5 Cancel

When the Cancel button is selected, the dialog is dismissed without saving any information and focus is returned to the EBT Household Demographics dialog.

11.20 Aggregated Issuance for EBT Account

The Aggregated Issuance for EBT Account dialog provides a means to review aggregated issuance information for a participant or household, transmit the issuance information to the J.P. Morgan EBT system, and print a list of the benefits issued through the EBT banking system. The dialog displays, issues, and prints issuance information for a selected participant or a household, depending on how the dialog is invoked. It is only available if the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic.

If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, the dialog is invoked by performing the following actions:

- Display the Benefit tabbed page on the Issue Benefits dialog. Select a participant in the Participant Household Information data grid. Click the Issue to Member Only button.

- Display the Benefit tabbed page on the Issue Benefits dialog. Click the Issue to Household button.

- Display the EBT Household Change Guided Script by selecting the Change Household ID menu item from the Participant Activities menu in the Participant Folder. Complete the listed steps in order and click on the Add Benefits to New Household link.

Figure 18 – Aggregated Issuance for EBT Account Dialog

11.20.1 Controls

This section describes the behavior of the controls on the Aggregated Issuance for EBT Account dialog.

11.20.1.1 Electronic Benefits Data Grid

The control displays information about food distribution items prescribed to a selected participant or to each member of a household depending on how the dialog is invoked. It is enabled when the dialog is active.

The rows of food distribution items are grouped by issuance period. The issuance period group headers display a title in the following format:

- {IPMonth}: {IPStartDate} thru {IPEndDate}

    - IPMonth – The full name of the month in which the issuance period begins.

    - IPStartDate – The start date of the issuance period in the following format: mm/dd/ccyy

    - IPEndDate – The end date of the issuance period in the following format: mm/dd/ccyy

Within each issuance period, the rows are split into columns to display the details of the prescribed food distribution items. The following columns are displayed:

- "Blank"

    - The header does not display a title.

    - The column displays food distribution items in the following format:
      {CategoryID}-{Sub-categoryID} {Sub-categoryName}

- "Participant Name"

    - An instance of this column is displayed for a selected participant or for each member of the household to whom benefits have been prescribed for the issuance period depending on how the dialog is invoked.

    - The header displays a title in the following format:
      {FirstName} {LastName}

    - The column displays the quantity of the food distribution item prescribed to the participant whose name appears in the header for the issuance period in the following format:
      ##.#

- Household Total

  - The column displays the total quantity of the food distribution item prescribed to all the members of the household for the issuance period along with the unit of measure in the following format:
    ##.# {Unit of Measure}

A row is added for each food distribution item prescribed to a selected participant or to each member of a household. The values are read-only.

Rows are sorted numerically in ascending order by EBT category and sub-category values.

11.20.1.2 Status Text Label and Value

The control displays the status of the dialog. The value displays in the inverse color of the form.

11.20.1.3 Print Benefits Button

The control starts the process of generating a benefit issuance report. It is enabled when the Send EBT Data button is clicked and the issuance data has been successfully transmitted to the J.P. Morgan EBT system. It does not have a mnemonic.

11.20.1.4 Send EBT Data Button

The control allows the user to negotiate a connection with the online EBT system, transmit the issuance information displayed in the Electronic Benefits data grid to the J.P. Morgan EBT system, and then save the data changes to the SPIRIT database upon success. A failure in the communication displays a message in the Status text label and value and a message box that details the error. This control is enabled until it is clicked if there is issuance information to be transmitted. The button will then be disabled so that duplicate benefits cannot be issued. It does not have a mnemonic.

11.20.1.5 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

11.20.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Aggregated Issuance for EBT Account dialog.

11.20.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "Aggregated Issuance for EBT Account".

- The Electronic Benefits data grid is populated with food distribution items prescribed to a selected participant or each member of a household, depending on how the dialog is invoked.

- The Print Benefits button is disabled.

- The Send EBT Data button is enabled.

- The Cancel button is enabled.

11.20.2.2 Print Benefit Report

When the Print Benefits button is selected, the Generate Benefit Report dialog defined in System Outputs Chapter 01 - System Outputs is invoked.

11.20.2.3 Send EBT Aggregated Issuance Data

When the Send EBT Data button is selected, the following processes are started:

11.20.2.3.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

11.20.2.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

11.20.2.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

11.20.2.3.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.

- The operation data is collected and a request passed to the SPIRIT Web Service.

- The timeout period is read from the State Business Rules (EBT_CONNECTION_TIMEOUT).

- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.

- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.

- When the process is completed successfully, the EBT benefit issuance information is saved to the database.

- If the process is not completed successfully, an error message will display in the Status text. The EBT benefit issuance information will not be saved to the database.

11.20.2.3.4.1 EbtCommunication Table

A temporary storage table is used to record EBT issuance details. This table will not record data for historical analysis as the data will be moved into the Food Instrument tables upon success.

Column Name	Data Type	Description
UniqueMessageID	varchar 30	Primary Key, it matches a data element of the JP Morgan interface specification with the same name, Field #11 in the record layouts.
Unique Benefit Issuance ID	varchar 20	It matches a data element of the JP Morgan interface specification with the same name, Field #19.
CommunicationDate	DateTime	Timestamp when transaction began.
HouseholdID	varchar 8	SPIRIT Household ID associated with the Transaction.
StartingDate	Date	Benefit Period Start Date, Field #17.
ExpirationDate	Date	Benefit Period End Date, Field #18.
BenefitItems	varchar 300	Up to 30 Cat-SubCat-Qty in 10 digit groups left justified, Field #22.
WicClinicID	int	WIC Clinic ID, Field #20.

11.20.2.4 Cancel

When the Cancel button is selected, the dialog is dismissed without saving any changes, and focus is returned to the Benefits tabbed page of the Issue Benefits dialog.